



Case Study: Assessing Tourism Potential of the Tanzanian Coast

Excerpted from: Tanzania Coastal Tourism Situation Analysis, 2001

Tourism is currently one of the leading economic sectors in Tanzania and has unlimited potential to contribute even more to the development of the country. To date, the tourism industry has been relying primarily on wildlife resources as the major attraction, with up to 90 percent of all tourists taking part in wildlife safaris or hunting. Recently, the need to diversify away from wildlife tourism and develop other attractions has been recognized by both the public and private sectors. The coastal zone is one of the areas that have untapped potential to attract tourism investment.

In 2001, a multi-stakeholder team performed a full assessment of Tanzania's coast and its potential for sustainable tourism. This **Coastal Tourism Working Group (CTWG)**, convened by the Tourism Division and the National Environment Management Council through the Tanzania Coastal Management Partnership, was composed of members of government agencies and the private sector. All members had extensive experience in fields related to coastal tourism, including, land use planning, tourism development and marketing, infrastructure development, antiquities, security, and environmental management. The group consulted experts from other fields, both nationally and internationally, as necessary.

The CTWG approached the assessment of Tanzania's potential for sustainable coastal tourism from several different angles. They studied

- tourism trends & market demand for Tanzania
- attractions inventory of the entire coastline
- accommodations/infrastructure inventory of the entire coastline
- accessibility to the coastline by road, boat, and air.

The CTWG sought to identify particular sites that had a strong potential for tourism based on having a variety of unique attractions, and then investigated whether accommodations and accessibility existed in those areas. **They considered these three factors - attractions, accommodations, and accessibility - to be three key factors for sustainable tourism.** To gather the information, the CTWG researched and reviewed available primary and secondary sources of information. Using issues and questions identified during this initial literature review, small teams from the group made field visits to the majority of coastal districts to learn the perspectives of local authorities, hotel owners and tour operators, and coastal communities.

Tourism trends

Tourism is already a major component of Tanzania's economy. Tanzania is ranked 9th in Africa in terms of international arrivals. Tourism grew markedly in the late 1990's, from 295,312 in 1995 to 627,325 in 1999. In 1999, tourism's contribution to Tanzania's Gross Domestic Product (GDP) was estimated to be 13 percent.

The CTWG found that most international visitors to Tanzania come from the UK, USA, Scandinavia, Germany, and Japan. The average length of a tourist's stay in Tanzania was found to be 7 nights, but this is an average of two different groups of tourists: Two-thirds of Tanzania's tourists visit the country as part of an African tour, usually entering the country from Kenya, spending about 4 nights in Tanzania and then returning to Kenya. The other third of tourists are traveling primarily to Tanzania, and stay longer than a week.

The overwhelming majority of international tourists come to Tanzania for its impressive wildlife. Over 90% of Tanzania's tourists participate in tours based on wildlife and nature, including photographic safaris, walking safaris, and hunting. Tourism based on marine or coastal resources are presently minimal, though a typical tourist itinerary often includes a safari in the Northern Circuit followed by a few days of relaxation on the beach, primarily in Zanzibar. It is expected that



this trend of wildlife-based holidays will continue, but there is unlimited potential for establishing beach or coastal 'add-ons' that will enhance a visitor's overall satisfaction and could, in time, become stand-alone tourist attractions in their own right.

Natural attractions

Attractive **beaches** can be found all along the Tanzanian coast and serve as one of the primary coastal tourism attractions. A number of beaches have already attracted tourism investment and are home to numerous human activities, including tourism, fishing, mariculture, etc. The team also discovered other attractive beaches with little or no tourism investment to date. In general, the beach areas were found to be in good condition, with the exception of a few sections where **beach erosion** due to poor construction practices had reduced the beach area dramatically over the past decade.

One constraint to the development of coastal tourism is the often **unattractive inter-tidal zone** of Tanzanian beaches at neap tide. At these times, the sea may not be accessible for tourists. This natural constraint gives more weight to the need for other tourist attractions in the immediate area so that tourists can plan their days based on the tide schedule.

There also are numerous **forest reserves** along the coast, including mangrove and coastal forests. These coastal reserves could be developed into tourist attractions if managed and promoted properly. A Mangrove Management Project is currently assessing the possibility of developing eco-tourism facilities in selected Mangrove Reserves. Currently, in one district, the mangrove forests found at the mouth of the Pangani River are one of the attractions of a **river tourist cruise** organized by the Pangani Coast Cultural Tourism Program and through some of the hotels in the area. Other areas have similar potential for boat trips, and **walking trails and boardwalks** could be developed as well. The team recommended development of an information center, boardwalks, and signposts, as well as training of local guides. Local communities could benefit from increased visitation to the reserves by serving as tour guides, providing accommodations and food and beverage services, and through the sale of traditional handicrafts.

The team noted several unique attractions along the Tanzanian coastline. The **Saadani Game Reserve** is the only place in eastern Africa where big game animals can be seen along the beach or bathing in the Indian Ocean. With improved infrastructure and marketing efforts (e.g. "where the bush meets the beach"), the potential for increasing visitation is excellent. Just north of this reserve is Madete Beach, a little known and rarely visited **nesting beach for green turtles**. This could be developed into an interesting and informative night trip from either Pangani or the game reserve itself. This attraction would need to be developed and managed very carefully as nesting turtles are easily disturbed by unfamiliar light and sounds.

Tanzania also has two **Marine Parks** and several **Marine Reserves**, which are tourist attractions with high potential. Other unique natural attractions along the Tanzanian coast include a natural **sulphur spring** at Tanga Municipality. At one time, the spring water was used for sulphur baths, which many people came to the area to enjoy. Since the nationalization of the attraction, however, the spring and baths have not been utilized. The Municipality would like to see the attraction developed and promoted, but is not in a position to do it alone. This is an area where strong public/private/local community partnerships could be developed.

Sport fishing is another activity that could attract tourists. Excellent big game fishing can be found at various points along the coast, but very few operators are currently taking advantage of this resource.



Cultural Attractions

The Swahili coast of Tanzania contains some world-class cultural sites that could be developed into stand-alone tourist attractions in time. In particular, the **ruins** at Kilwa Kisiwani and Songo Mnara, designated as UNESCO World Heritage Sites, have unlimited potential to attract tourists.

Other cultural attractions, such as **local *taraab* music performances, artisanal fishing and agriculture and traditional handicraft production**, exist but are not systematically managed or promoted so it is difficult to assess how many tourists are enjoying these types of experiences. However, in at least one coastal town, Pangani, a **cultural tourism program** has been developed to promote local, village-based tourism in that area. This successful initiative could be replicated in other coastal areas to promote local culture.

It is important to note, however, that the development of traditional performing arts and culture into tourist attractions may have some impacts on the local culture itself. For example, a local *taraab* group could begin performing for tourists on a regular basis, so much that the original audience of the local community begins to feel that they are not as important to the group as the fee-paying tourists. Conflicts could then emerge and what was once a community event for the community has now changed into a group performance for foreign tourists. These types of cultural changes are inevitable when people of different backgrounds come together. The degree of acceptable change can only be determined by the local people themselves.

In general, the cultural heritage sites along the coast are in poor condition and therefore are not currently set up to handle tourists. Most sites under the supervision of the Antiquities Department are supervised by just one staff person, and, in consequence, much work remains to be done.

Accommodations

The CTWG performed a careful assessment of available tourist accommodations, traveling along most of the coastline and noting the type and number of lodging establishments in every village, for example:

Kilwa

“There are numerous small guesthouses in Kilwa Masoko and Kilwa Kivinje. These are all locally owned and operated establishments offering basic accommodation for less than 5,000 Tsh. A small, tented camp has recently been established on the beach at Jimbiza - the owners have plans to develop a luxury lodge at the same site in the near future.”

Most coastal locations were assessed in this highly detailed way. The team particularly focused on the concept of “value for money” - whether the hotel’s accommodations and quality matched the price charged. They interviewed hotel owners about their opinions, plans and goals.

Difficulties in improving hotel accommodations were identified as: insufficient infrastructure (most hotels have to provide their own water, energy, and waste disposal); excessive tax burden (up to 40% of revenue); poor communications, which hinders the hotels’ abilities to take reservations over the telephone or internet, and causes difficulty in emergencies; and lack of trained staff.

Accessibility

A major goal of the CTWG was to identify whether tourists could reach the attractions and accommodations. The CTWG studied, and traveled along, the roads, river ferries, and airlines that link Tanzania’s rural coastal community to larger cities where tourists will arrive, and between potential attractions. They identified major accessibility problems that need improvement (described below).



Putting it All Together: Identifying Sites with Best Potential for Tourism

Taking into account the uniqueness and diversity of natural and cultural attractions, the CWTG identified three areas that have the best potential for attracting tourism:

1. Kilwa District, and the adjacent Mangrove Reserves and nearby caves. The ancient ruins found in Kilwa District are quite extensive and unique, which is why UNESCO named them as a World Heritage Site in 1981. The ruins are located in beautiful tropical island settings, so the journey to the islands of Kilwa Kisiwani and Songo Mnara is just as enjoyable as touring the ruins. While these ruins, not to mention the old town of Kilwa Kivinje, are the cornerstone of this area in terms of tourism, the natural attractions, such as the beaches, mangroves and hippo pools, and local lifestyles, such as *taraab* and artisanal fishing, are excellent attractions in their own right.

The diversity of these attractions has the potential to make the Kilwa area one of the best coastal destinations in the region. However, as stated above, having one key component without the other two can hinder an area's tourism development. Relatively poor access and the lack of adequate accommodation in the area need to be addressed before Kilwa truly becomes a world class tourism destination.

2. Saadani Game Reserve and adjacent areas, Pangani in the north and Bagamoyo/Kinondoni in the south. Saadani has a unique and world-class attraction of large game animals at the seashore. The linkage of Saadani with these two other areas would provide tourists with many diverse and unique attractions and activities within a relatively small area. Saadani Game Reserve is an excellent attraction but suffers from a lack of accommodation and poor access. Both Pangani and Bagamoyo towns have good attractions and accommodations, but access needs to be improved. Saadani, Pangani and Bagamoyo, on their own, cannot truly develop into world-class tourist destinations. This area will require improvement of road and water access, construction of more hotels, and development and marketing of a unified tourism plan for the entire region that allows tourists to easily move between all three areas.

3. Mafia Island area. Mafia Island is increasingly becoming known as having the best dive sites in the eastern Indian Ocean. The development of the **Mafia Island Marine Park** has assisted in putting the island on the tourist map, as has word of mouth from satisfied visitors. The excellent diving and snorkeling are the primary attractions, but the area has many other excellent attractions as well, including nice beaches on the western side of the main island, the smaller islands surrounding the main island, a few ruins of early inhabitants and the relatively untouched feel of the area as a whole. Other attractions include the Rufiji Delta, a short boat ride away, and unique bird and animal species, such as the Comoros Fruit Bat and dugongs.

Accommodation on the island is primarily up-market, but the TAHI lodge could be improved to provide middle-market tourists with a less expensive option. One of the major constraints to this area becoming a world-class destination is the high transport cost associated with remote island tourism development. Add to that the cost and unreliability of air travel and many tourists will opt for the less expensive and easier route and go to Zanzibar instead. Improving transport may bring a relatively rapid pace of investment, however; measures need to be put in place in the short-term to ensure that the fragile coastal ecosystems are preserved.

These three areas were identified as the 'jewels' of Tanzania's Swahili Coast. Other areas have excellent attractions as well, but these three priority areas have the most potential because of the uniqueness of the sites and resources and the diversity of attractions within a small area.



Priority Recommendations for Coastal Tourism in Tanzania:

1. Develop streamlined investment procedures for coastal hotel development.

Investors would benefit from a less bureaucratic and more consistent process, which would facilitate new investment in the industry. The streamlined procedures could take the form of Investment Guidelines for Coastal Hotel Development. Key issues are the acquisition of land, the roles of local authorities and communities in the review process, and the importance of conducting Environmental Impact Assessments that take environmental, social and cultural factors into consideration.

2. Identify priority areas for coastal tourism development and develop comprehensive tourism management plans for those areas.

While all areas of the coast have the potential to become excellent tourist destinations, given limited resources, it is necessary to identify the areas with the best potential, and focus efforts and resources on those areas. In addition, the team noted that because many attractions are under the supervision of different government sectors, a comprehensive plan that includes all natural and cultural attractions and accommodations needs to be developed.

3. Improve Accessibility to Coastal Tourism Areas

Accessibility to the coast was found to be limited. Without safe and efficient modes of transport to coastal tourist areas from other tourist hubs, coastal tourism will remain quite limited. Specific recommendations to improve accessibility included:

- **Improve road infrastructure to the coast**, particularly the coastal roads from Dar es Salaam-Bagamoyo-Saadani-Pangani-Tanga and from Dar es Salaam-Kilwa-Lindi.
- **Consider the possibility of constructing bridges** over the Pangani and Wami Rivers.
- **Improve the airport at Mafia and adjust flight schedules to minimize stopovers.**
- **Improve ferry service for river crossings** at Pangani, Wami and Rufiji Rivers.
- **Investigate the feasibility of developing sea ferry services** along the coast, especially from Dar es Salaam to Tanga (making stops at Bagamoyo, Saadani and Pangani) and between Dar es Salaam, Mafia and Kilwa.

4. Promote local investment in coastal tourism areas.

One of the ways to ensure that coastal tourism benefits the local communities along the coast, as well as other local investors, is to identify and promote specific enterprises that local people can undertake. Once these enterprises are identified, it is necessary to develop business training programs for local people as well as ensure that local investors have information about potential sources of capital. The types of enterprises that local communities could engage in include handicraft production, foodstuffs and other products using local materials to sell to hotels, and supporting services, such as tour guides, local transport, and restaurants.

5. Conduct economic analyses on the costs and benefits of different types of coastal accommodation and develop right mix of investment incentives.

The National Tourism Policy clearly states that Tanzania aims to attract and promote up-market tourism, avoiding mass tourism development. However, specific guidance in terms of size and type of hotel accommodation are not provided. Other issues to be considered in determining what types and sizes of accommodation should be promoted include the environmental impact of construction and operation, the degree to which local people are benefiting from different types of hotels, and the need to ensure adequate airline services to the country as a whole. This will require attracting enough tourists to support regular international flights.